



SPRING CONFERENCE

Kansas City, Missouri

2003

Session 25

What's New in EDEExpress 9.1 Direct Loan for 2003-2004

Agenda

- Highlight 2003-2004 changes to the Direct Loan module
- Share EDExpress Direct Loan processing tips
- Evaluations
- Questions?

COD Participation

- Starting in 2003-2004
EDExpress users will be full
participants in COD

New Terminology

OLD TERM

LOC

Loan

Origination

Acknowledgement

Batch ID

Anticipated

Disbursement

NEW TERM

COD

Award

Edit Only

Response

Document ID

Edit-Only

Disbursement

Global Changes

- For Direct Loan and Pell only, Batch ID has been replaced by Document ID on the screens and the reports
- Link to the FSA Schools Portal has been added to the Help pull-down menu
- Link to FAA Access to CPS Online has been added to the View pull-down menu

Setup

- Direct Loan School setup
 - Added a Funding Method column to each record
 - Added Reporting Entity ID and Attended Entity ID columns
 - Required entry for all users
 - This field is similar to Pell

DL - School Setup

Direct Loan School [X]

Code	Reporting Entity	Attending Entity	Funding Method
G01371	11111111	11111111	ADVANCE PAY

School...
OK
Cancel
Help

Setup

- Direct Loan Tolerances setup
 - Added a Document Activity (COD Common Record) field
 - Removed all Batch Activity fields
- Direct Loan System setup
 - Added a Source Entity ID field
 - Required entry for all users
 - Added Third Party Servicer checkbox

DL - Tolerances Setup

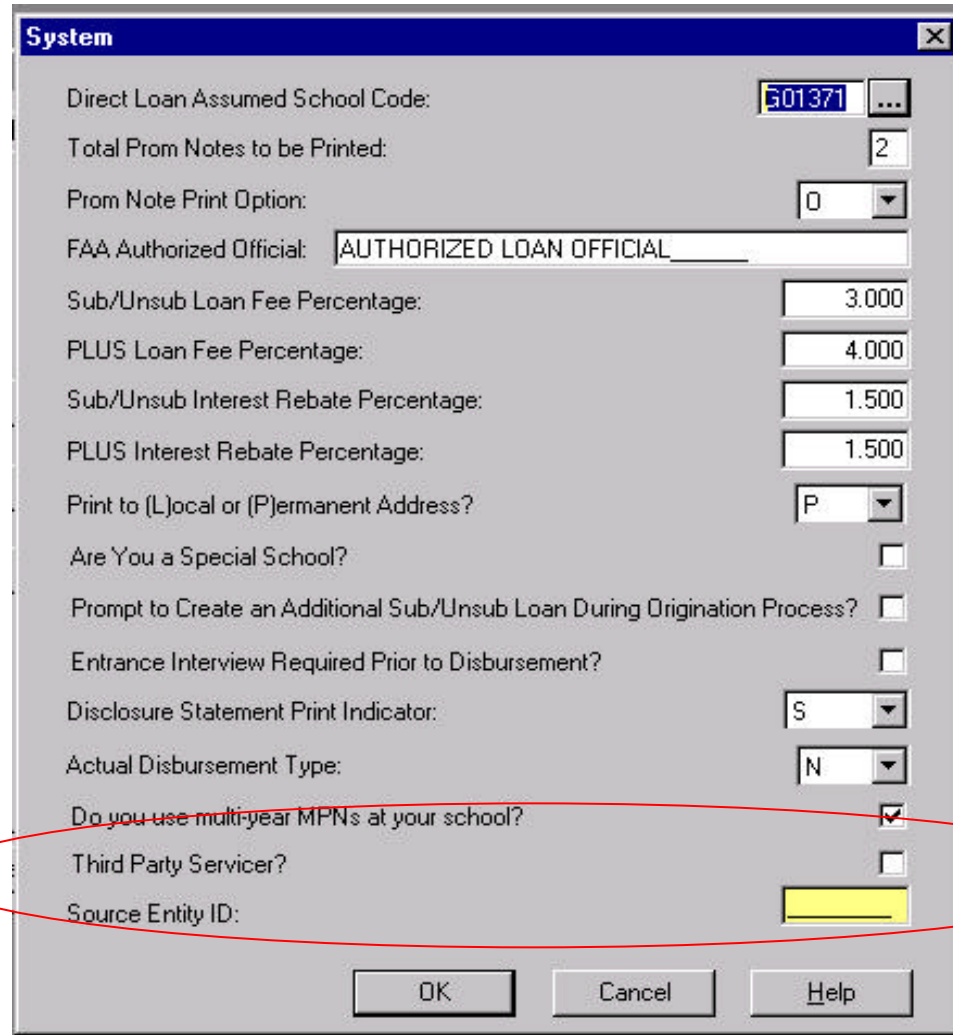


Tolerances [X]

Prom Notes (Received to Manifest):

Document Activity (COD Common Record)

DL - System Setup



System

Direct Loan Assumed School Code: 501371 ...

Total Prom Notes to be Printed: 2

Prom Note Print Option: 0 ▾

FAA Authorized Official: AUTHORIZED LOAN OFFICIAL

Sub/Unsub Loan Fee Percentage: 3.000

PLUS Loan Fee Percentage: 4.000

Sub/Unsub Interest Rebate Percentage: 1.500

PLUS Interest Rebate Percentage: 1.500

Print to (L)ocal or (P)ermanent Address? P ▾

Are You a Special School? ☐

Prompt to Create an Additional Sub/Unsub Loan During Origination Process? ☐

Entrance Interview Required Prior to Disbursement? ☐

Disclosure Statement Print Indicator: S ▾

Actual Disbursement Type: N ▾

Do you use multi-year MPNs at your school? ☒

Third Party Servicer? ☐

Source Entity ID:

OK Cancel Help

Direct Loan Tab

- Removed Loan Amount Requested field
- Added CPS Transaction Number field
- Changed all “Batch ID” or “Batch #” field labels to “Document ID”
- Changed all “Promissory Note Status” field labels to “MPN Status”
- Enabled Disclosure Statement Print Indicator and Printed Field for PLUS Loans

Direct Loan Tab

- Modified Prom Note Information fields for PLUS Loans
- Removed Accepted Note ID field

Disbursement Tab

- Added “Disbursement Release Indicator” (DRI) field to Edit-Only Disbursement grid
- Move values from an Edit-Only Disbursement record to the Actual Disbursement grid when the DRI is selected
- Moved the First Disbursement flag from the Action Fields to the Edit-Only Disbursement grid








Disbursement Tab

- Changed “Anticipated Disbursement” grid to “Edit-Only Disbursement”
- An Edit-Only Disbursement is disabled when the Disbursement Release Indicator (DRI) is selected
- Removed “D” and “U” from the Action Type field
- Removed “Disbursement Confirmed” flag

Disbursement Tab

2003 - 2004 EDEExpress for Windows - [(001488578-S-04-G36764-001) MICHAEL D'ARCY-CALDERON]

File Record View Help










Direct Loan

Loan Type: DIRECT SUBSIDIZED Loan #: 1 of 1 Loan Amount Approved: 2,625
 Loan Status: R MPN Status: R
 Loan Entrance Interview Date:

Edit-Only Disbursements

#	Date	Gross	Fee	Rebate	Net Amount	Disbursement Release Indicator	First Disbursement?	Exp to External
1	10/10/2003	1313	39	20	1294	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	01/10/2004	1312	39	20	1293	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Totals		2625	78	40	2587			

Action
 Disbursement: Type: Date:  Amount:

Actual Disbursements

#	Disb #	Type	Date	Seq #	Gross	Fee	Rebate	Net	Net Adj	Status	Reject Codes	Docur
Totals:					0	0	0	0				

Multiple Entry

- Changed “MPN/Promissory Note Status” references to “MPN Status”
- Removed Direct Loan Confirmation Code
- Disclosure Printed field can now be updated
- The corresponding Edit-Only Disbursement Release Indicator (DRI) flag will be checked (set to true) if a Disbursement Type of “D” is used
- “U” changes from “Use Anticipated Disbursement” to “Update DRI to True”

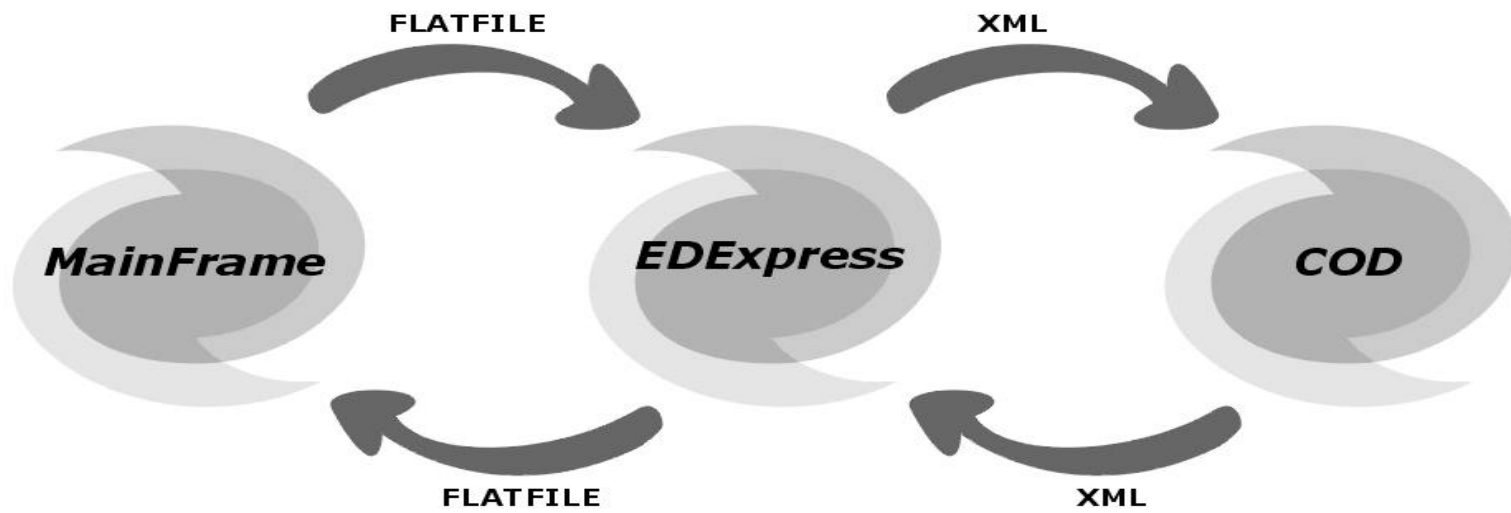
Import from EDExpress Modules

- No changes to ISIR imports from Application Processing module to Direct Loan
- No changes to Packaging loan data imports to Direct Loan

Import/Export between EDExpress & Mainframe

- External Add—Origination and Disbursement data will remain in the flat ASCII file format
- External Change—Origination and Disbursement data will also remain in the flat ASCII file format
- File Format (export to mainframe) remains in the flat ASCII file
- Changes made to the record layouts to accommodate adding and deleting of fields

DL - Combination



Exports—COD

- Origination, Change and Disbursement data exports have been removed
- New Common Export
 - Common Record combines both Origination and Disbursement data
 - This file is in the new XML format and sent to COD
 - Common Record message class
 - COMRECIN (EDEXpress to COD)

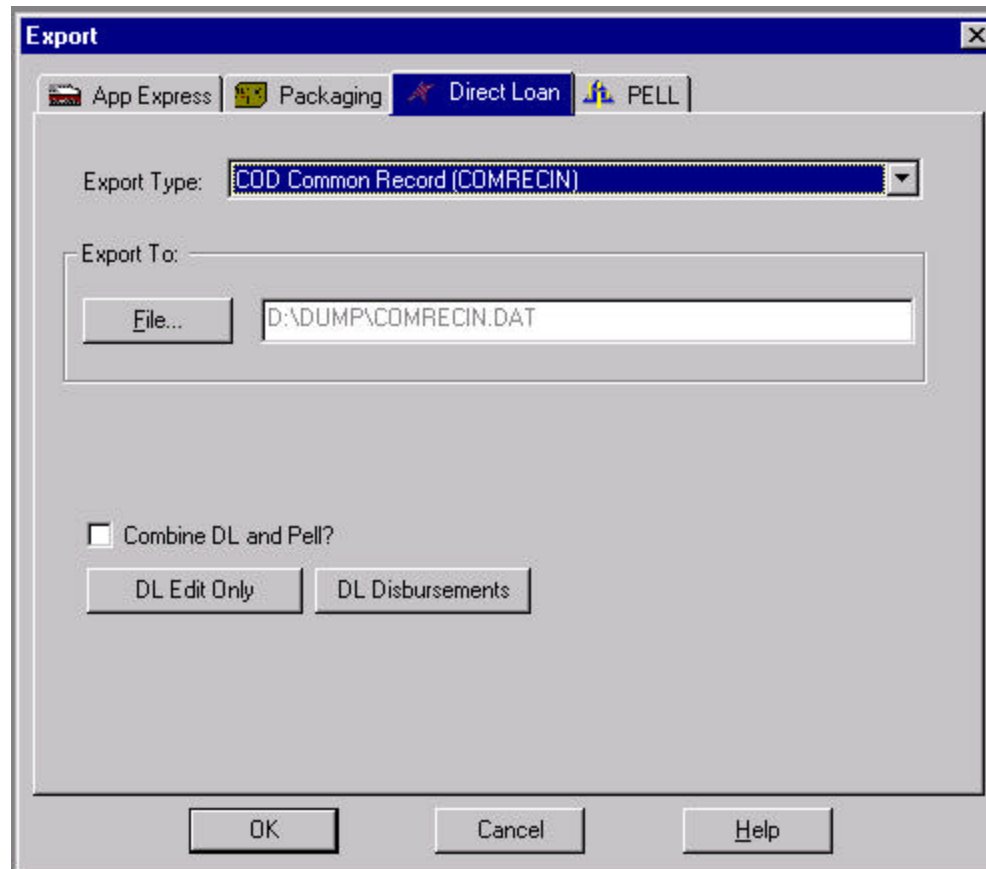
Exports—COD

- Document IDs have new format:
 - CCYY-MM-DDTHH:mm:ss.ff99999999
 - CCYY-MM-DD (Century, Year, Month, Date)
 - T (Constant “T”)
 - HH:mm:ss.ff (Hours, minutes, seconds, thousandths)
 - 99999999 (Source Entity ID from setup)

Exports—COD

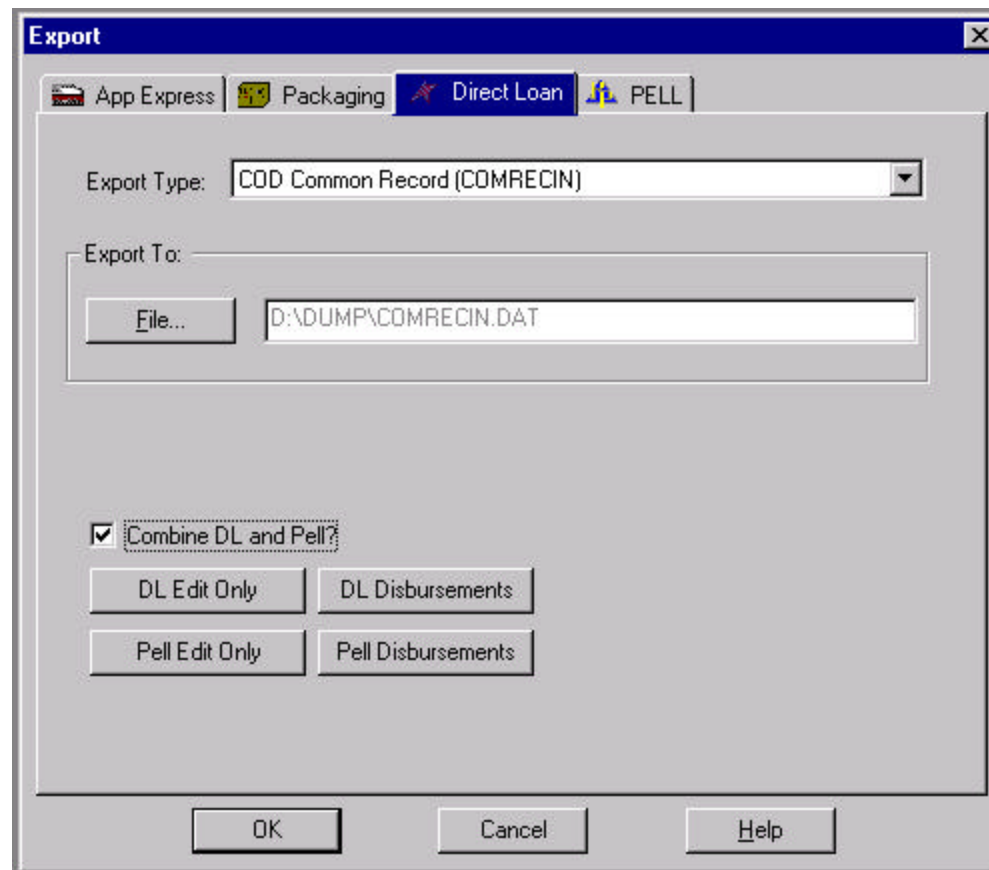
- For the Common Record the user can choose to export both Direct Loan and Pell data combined
- Users will be able to regenerate Common Record documents

DL - Export



The image shows a Windows-style dialog box titled "Export". It has a tabbed interface with four tabs: "App Express", "Packaging", "Direct Loan" (which is selected), and "PELL". Below the tabs, there is a section for "Export Type:" with a dropdown menu currently showing "COD Common Record (COMRECIN)". Below that is a section for "Export To:" which includes a "File..." button and a text field containing the path "D:\DUMP\COMRECIN.DAT". Further down, there is a checkbox labeled "Combine DL and Pell?" which is currently unchecked. Below the checkbox are two buttons: "DL Edit Only" and "DL Disbursements". At the bottom of the dialog box are three buttons: "OK", "Cancel", and "Help".

DL - Export



The image shows a Windows-style dialog box titled "Export". It has a tabbed interface with four tabs: "App Express", "Packaging", "Direct Loan" (which is selected), and "PELL".

Inside the "Direct Loan" tab, there is a section labeled "Export Type:" with a dropdown menu currently showing "COD Common Record (COMRECIN)".

Below that is a section labeled "Export To:" which contains a "File..." button and a text field displaying the path "D:\DUMP\COMRECIN.DAT".

Further down, there is a checked checkbox labeled "Combine DL and Pell?".

At the bottom of the main content area, there are four buttons arranged in a 2x2 grid: "DL Edit Only", "DL Disbursements", "Pell Edit Only", and "Pell Disbursements".

At the very bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Help".

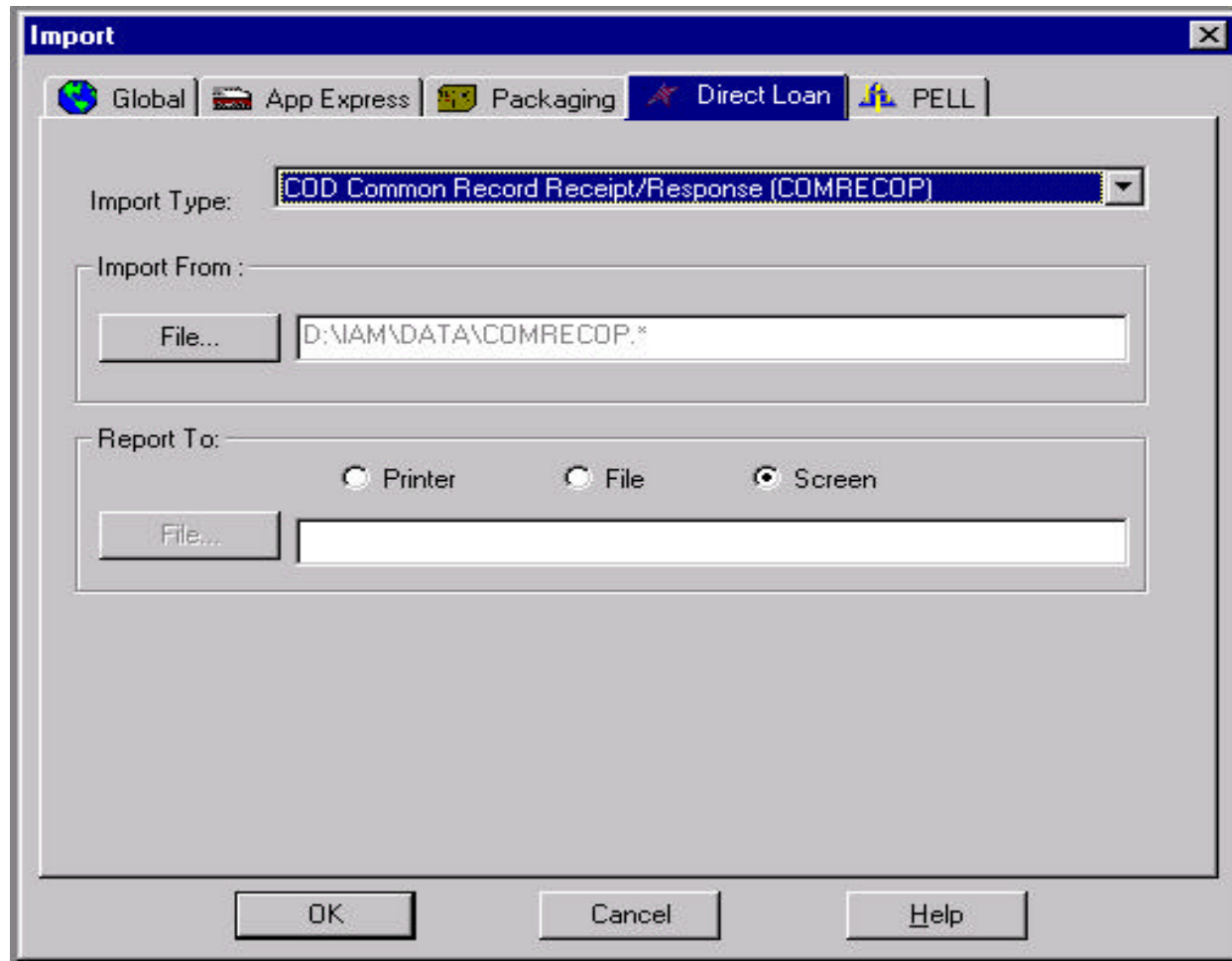
Exports—COD

- Edit-Only is basically the origination information with anticipated disbursement dates
 - If the DRI is set to false (unchecked), COD treats the Disbursement data as an Anticipated Disbursement
 - If the DRI is set to true (checked), COD treats the Disbursement data as an Actual Disbursement

Imports—COD

- Majority of data received from COD will be in the new XML format
 - Reports remain fixed-length, flat ASCII file for EDEExpress users
- Removed Origination, Change and Disbursement Acknowledgements
- Acknowledgements have been replaced with COD Common Record Response
 - COMRECOP (COD to EDEExpress)

DL - Import



The image shows a software dialog box titled "Import". At the top, there is a tabbed interface with five tabs: "Global", "App Express", "Packaging", "Direct Loan" (which is currently selected), and "PELL". Below the tabs, the "Import Type:" is set to "COD Common Record Receipt/Response (COMRECOP)" in a dropdown menu. The "Import From:" section contains a "File..." button and a text field with the path "D:\IAM\DATA\COMRECOP.*". The "Report To:" section has three radio buttons: "Printer", "File", and "Screen", with "Screen" being the selected option. Below these radio buttons is another "File..." button and an empty text field. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

Imports—COD

- COD imports remaining in flat ASCII file format:
 - Pending Disbursement List
 - Funded Disbursement List
 - 30 Day Warning Report
 - ED Initiated
 - Entrance Counseling
 - Exit Counseling
 - Duplicate Student Borrower Report
 - Inactive Loans Report
 - SSN/Name/DOB Change Report

Reports

- Users can now print to a file from within a student's record
- Users can now e-mail User-Defined Letters to their students
 - E-mailed version does not have SSN
- New Student Summary report—This is a summary of all student data, including both Direct Loan and Pell information

Reports

- New PLUS Disclosure Statement—Schools can print this report if a PLUS Award record has a positive credit decision
- All reports will be displayed with updated COD terminology and layouts



Direct Loan Processing Tips

Tip #1

- File | Export | Direct Loan | Combine Direct Loan and Pell option
 - Users can combine the Direct Loan and Pell “ready-to-go” data into one file for transmission to COD
 - Benefit of only having to export one file and to transmit one file

Tip #2

- Tools | Setup | Global | Security Users | Export to EDconnect option
 - By selecting this option, each time a user exports files that are to be sent to COD, the exported files will automatically populate the EDconnect transmission queue

Tip #3

- Tools | File Format | Direct Loan
 - Create two formats to get the basic origination and disbursement data out of EDExpress
 - Origination format could include the following fields:
 - NAME, Origination ID, Amount (award), Status
 - Same could be done for Disbursement data
 - Or create one format that contains all the data

Tip #4

- If you are using EDEExpress Direct Loan or Pell modules in 2003-2004, please remember to sign up as a Full Participant with COD
- This can be done in the PC Lab

Tip #5

- Plan to attend Direct Loan EDExpress training
- Training dates will be announced in the near future on IFAP

Contact Information

We appreciate your feedback and comments

CPS/WAN Technical Support

Phone: 1 800 330 5947

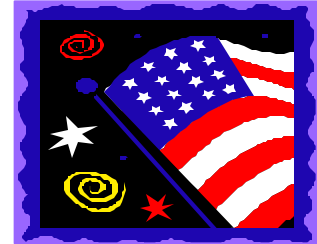
E-mail: cpswan@ncs.com

FSATech Listserv

E-mail: fsatech@inet.ed.gov

Sign-up information:

<http://www.ed.gov/offices/OSFAP/sfatech/listserv.htm>



Email: CPSWAN@NCS.com

Subject line (which function interested in):

- Beta Test
- Beta Reviewer
- Focus Group
- Usability Test

Note: Include in body text what module/
application as well as the type of system setup
you have if you've indicated Beta Test



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